



Client Services Agreement & Terms & Conditions

Thank you for choosing OC Travel.

I believe the best vacations begin well before departure. They begin with understanding how you want your time away to feel — whether that means reconnecting, celebrating, slowing down, exploring somewhere new, or simply enjoying the freedom to travel more intentionally.

My role is to design a travel experience that feels seamless, well considered, and personal to you. Whether we are planning a Caribbean escape, a European journey, or a thoughtfully tailored North American getaway, this agreement outlines how we will work together so the planning process feels as clear and comfortable as the trip itself.

My Commitment to You

As your travel advisor, I will:

- Take the time to understand your travel preferences, priorities, and overall vision
- Recommend destinations, hotels, cruises, and travel partners aligned with your goals
- Offer thoughtful, professional guidance based on research and experience
- Coordinate confirmed reservations and key travel details
- Advocate on your behalf with suppliers whenever possible
- Support you before departure and assist with supplier-related issues that may arise during travel

Every recommendation is made with care, intention, and attention to fit — because the right vacation is not simply about where you go, but how the experience comes together for you.

The Planning Experience

My planning process begins with a conversation, not a transaction.

Before I begin researching destinations, hotels, cruises, tours, or itinerary options, I take time to understand what matters most to you, including:

- The overall feel you want your vacation to have
- Your travel style and priorities
- Your budget parameters
- Your preferred pace of travel
- Your personal interests
- Any celebrations, milestones, or special requests

Following our consultation, I will typically:

- Research and evaluate options aligned with your goals
- Curate recommendations tailored to your needs
- Present a proposal or thoughtfully selected set of options
- Make reasonable refinements, if needed
- Coordinate confirmed reservations
- Continue supporting you through departure

My goal is not to overwhelm you with endless choices. It is to help you make confident, well-informed decisions with clarity and ease.

Included Planning Services

Most standard vacation planning services provided by OC Travel are compensated through commissions paid by travel suppliers and therefore do not typically require a separate planning fee.

Included planning services generally consist of:

- Initial consultation
- Research and sourcing for a standard trip request
- One curated proposal or recommended set of options
- One reasonable round of revisions within the original planning scope
- Coordination of confirmed reservations
- Pre-departure support

When Additional Planning Fees May Apply

Some travel experiences require a greater level of customization, research, coordination, and design than a standard vacation proposal.

Examples may include:

- Complex multi-country itineraries
- FIT (Fully Independent Travel) planning
- Extended European travel

- Multi-city journeys
- Luxury custom itineraries
- Destination weddings
- Group travel
- Specialized or highly customized requests

Additional planning fees may also apply if the scope of the original request changes significantly after a proposal has already been prepared.

Examples may include:

- Changing the primary destination or region
- Shifting from one type of vacation to another
- Significant budget changes
- Requesting multiple entirely different destination concepts
- Extensive redesigns after proposals are completed
- Restarting the planning process with a new direction

If an additional planning fee is appropriate, it will always be discussed in advance. No fee-based work will begin without your knowledge and agreement.

Revision Scope

One reasonable round of revisions is included with each standard proposal.

Included revisions may involve:

- Comparing hotel options
- Adjusting room categories
- Modifying travel dates
- Updating transfers
- Adding or removing excursions

Requests that materially change the direction or complexity of the trip may require an additional planning fee before further research is completed.

This structure helps ensure that each client receives the time, focus, and thoughtful attention their travel plans deserve.

Proposal Validity

Travel pricing and availability are dynamic and may change at any time.

Unless otherwise noted, vacation proposals are valid for three (3) business days. After that period:

- Pricing may change
- Promotions may expire

- Availability may become limited
- Flights may increase in cost
- Updated research may be required

Because travel inventory changes quickly, timely decisions help protect both availability and value.

Booking Readiness

Travel proposals are prepared for clients who are ready to move forward if the recommended arrangements are the right fit.

Clients should generally be prepared to submit any required supplier deposit within three to five (3–5) business days of receiving their proposal.

Pricing & Availability

All pricing is subject to change and availability at the time of booking.

Rates are not guaranteed until deposit or full payment has been received and confirmed by the travel supplier. Supplier policies, inventory, entry requirements, and travel conditions may change without notice.

OC Travel cannot guarantee future pricing, promotional offers, room categories, flights, or travel availability.

Deposits & Final Payments

Deposit requirements, payment schedules, and final payment deadlines are determined by the travel supplier.

Failure to make payments by supplier deadlines may result in:

- Cancellation of reservations
- Price increases
- Loss of promotional offers
- Supplier-imposed penalties

OC Travel is not responsible for cancellations, penalties, or losses resulting from missed payment deadlines.

Payments for travel arrangements are made directly to the applicable supplier or suppliers using the traveler's authorized payment method, unless otherwise disclosed through an approved payment process.

For your protection and in keeping with professional travel industry standards, client funds are not collected by OC Travel and then paid to a supplier using the advisor's personal or business credit card. The traveler's own payment method must be used directly with the vendor.

Cancellations & Refunds

Cancellation policies vary by supplier and are governed by the terms in effect at the time of booking.

Any cancellation penalties imposed by a supplier are the responsibility of the traveler. Refunds, when available, are issued solely at the discretion of the supplier and according to that supplier's terms and timelines.

Travel Protection

OC Travel strongly recommends the purchase of comprehensive travel protection for every trip.

Travel protection may provide valuable coverage for:

- Trip cancellation
- Trip interruption
- Medical emergencies
- Emergency medical evacuation
- Travel delays
- Lost baggage
- Supplier financial default, where applicable

Clients who decline travel protection acknowledge that they are assuming the financial risk associated with unforeseen events. If travel protection is declined, the traveler understands that cancellation penalties, interruptions, medical expenses, delays, supplier issues, and other travel-related losses may not be reimbursable.

Travel Documentation

It is the traveler's responsibility to obtain and maintain all required travel documentation.

This may include:

- Passports
- Visas
- Entry documentation
- Vaccination records
- Any destination-specific government requirements

All traveler names must match government-issued identification exactly.

Please confirm that passports meet all destination requirements, including validity rules that may extend beyond travel dates.

OC Travel is not responsible for denied boarding, denied entry, missed travel, or losses resulting from incomplete, inaccurate, or invalid documentation.

Reservation Accuracy

Upon receiving confirmations and travel documents, please review all details carefully, including:

- Traveler names
- Dates
- Destinations
- Flights
- Accommodations
- Room categories
- Other booked services

Any errors or discrepancies must be reported immediately.

Health, Mobility & Accessibility

Please share any mobility needs, medical considerations, dietary restrictions, or accessibility concerns prior to booking.

I am happy to recommend suppliers and travel arrangements that may best support your needs; however, accessibility standards and accommodations vary by supplier and destination and cannot be guaranteed by OC Travel.

Supplier Responsibility

OC Travel acts as an independent travel advisor and arranges travel services through third-party suppliers, which may include:

- Airlines
- Cruise lines
- Hotels and resorts
- Tour operators
- Ground transportation providers
- Activity and excursion providers

OC Travel is not responsible for the acts, omissions, errors, delays, cancellations, schedule changes, overbookings, equipment failures, service interruptions, injuries, losses, or financial default of any travel supplier.

Force Majeure

OC Travel shall not be liable for delays, changes, interruptions, or losses resulting from events beyond its reasonable control, including but not limited to:

- Severe weather
- Hurricanes

- Natural disasters
- Pandemics or public health events
- Government actions or advisories
- Civil unrest
- Labor disruptions
- Transportation interruptions
- Mechanical failures

Communication

Providing attentive, thoughtful service is important to me.

Business Hours:

Monday through Friday

I strive to respond to messages within one business day.

While you are traveling, I will assist with supplier-related concerns whenever possible and advocate on your behalf should unexpected issues arise.

Privacy

Your privacy matters.

Personal information is shared only with suppliers and service providers as necessary to research, reserve, and manage your travel arrangements.

OC Travel does not sell or distribute personal information for unrelated marketing purposes.

Professional Recommendations

All recommendations are based on professional experience, supplier relationships, destination research, and the information you share during the planning process.

Travel experiences are personal and inherently subjective. While every recommendation is made thoughtfully and in good faith, specific outcomes or experiences cannot be guaranteed.

Limitation of Liability

To the fullest extent permitted by law, OC Travel shall not be liable for any indirect, incidental, consequential, special, or punitive damages arising from or related to travel arrangements made through third-party suppliers.

Governing Law

This Agreement shall be governed by the laws of the Commonwealth of Massachusetts.

Acceptance of Terms

By submitting payment, replying in writing with authorization to proceed, or otherwise providing electronic confirmation for any reservation arranged through OC Travel, you acknowledge that you have read, understood, and agreed to these Client Services Agreement & Terms & Conditions. Electronic acceptance and/or payment shall constitute acceptance of these terms.

Advisor Information

OC Travel
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